Authority TaxConnect

E-File Help Guide

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Contents

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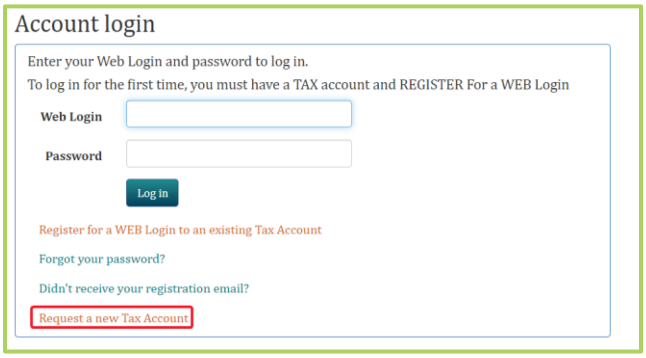
Copyright Notice

Registering for the First Time

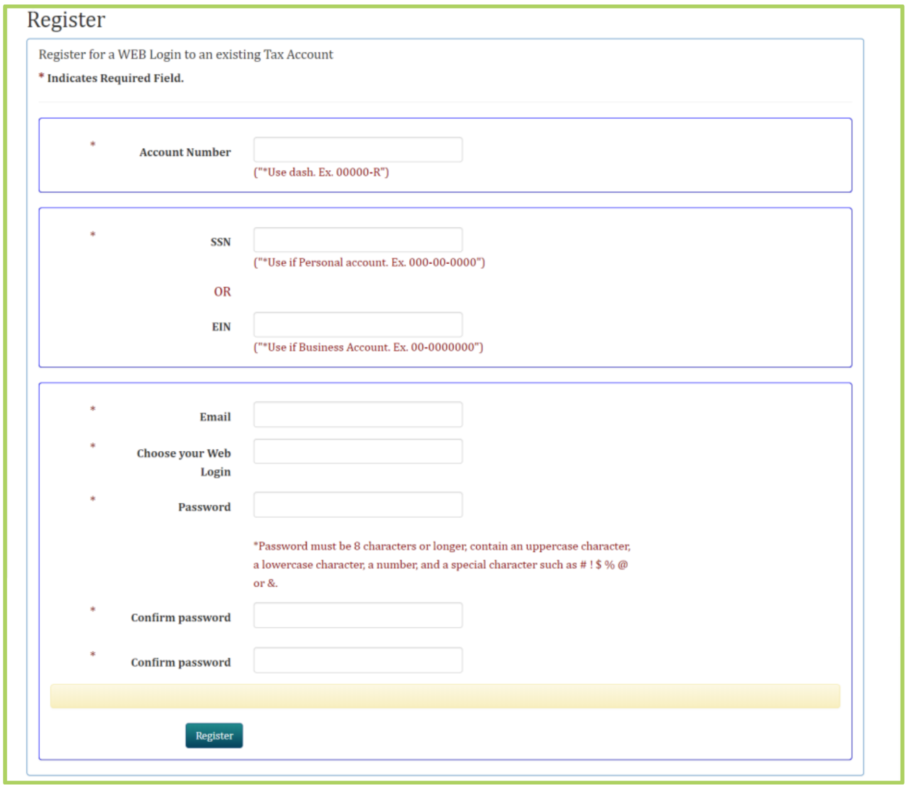
IMPORTANT! In order for the taxpayer to use the online E-File system, they **MUST** complete the following steps to obtain a WEB Login.



- Click *Register for a WEB Login to an existing Tax Account* to register for a Login ID and Password

Your Account Information

- Fields Marked with '*' are required.



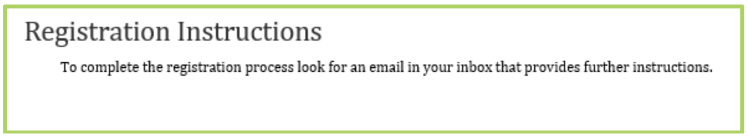
- **Account Number -** Enter your Account Number (Include all preceding zeros in your account number)
- **SSN OR EIN -** Enter your Federal ID for a Business Account (EIN), or your Social Security Number (SSN) for an Individual Account
- **Email -** Enter your valid Email address
- **Choose your Web Login -** Enter a Username. (Case Sensitive)
- **Confirm Password -** Enter a Password. (Case Sensitive)

NOTE: *Password must be 8 Characters or longer, contain an uppercase character, a number, and a special character such as # ! $ % @ or &.*

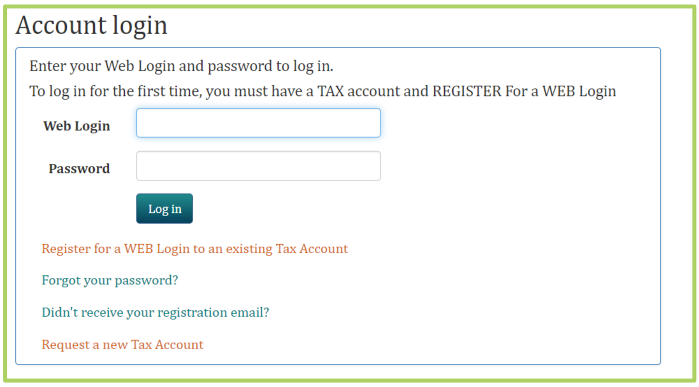
- **Confirm Password -** Enter your Password again, exactly like you did in the previous Password Field
- Click the **Register** button

Registration Instructions Screen

- To complete the registration process, look for an email in your inbox that provides further instructions



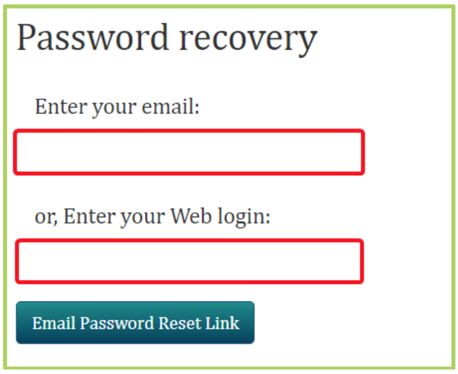
Log in Screen



- Enter your Login information
  Web Login – Enter the Username you created (Case Sensitive) in the Login Field
  Password – Enter the Password you created (Case Sensitive) in the Password Field

NOTE: *If you have forgotten your Password, Click **Forgot your password?***

The following screen displays:

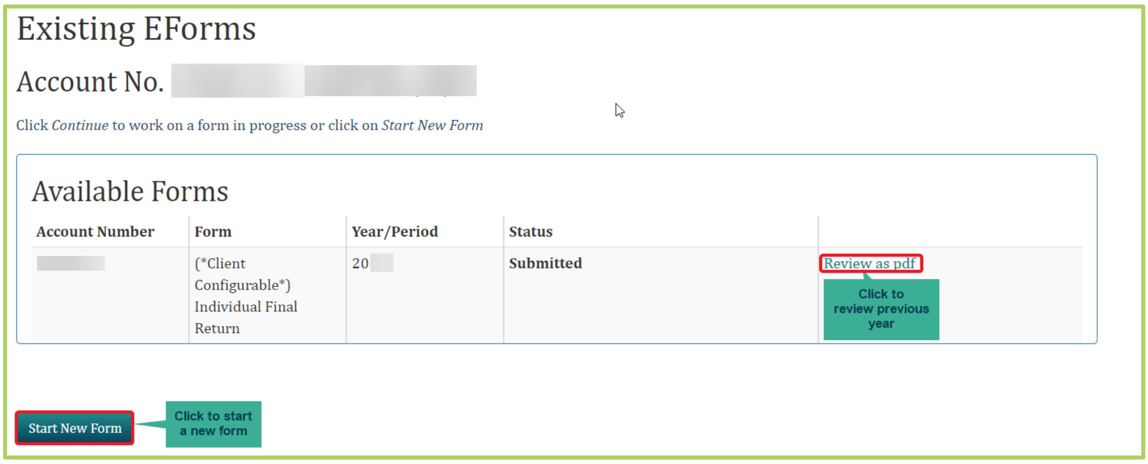


- Enter the Email address or web login you have associated with your account and it will send you a link to your email to reset your password
- Click the **Email Link** button

Tax Menu: E-File

- The Individual E-File option allows a user to submit their tax information online
- Under *Tax Menu*, click **Individual E-File**

The following screen displays any Existing E-Forms associated with the selected account:

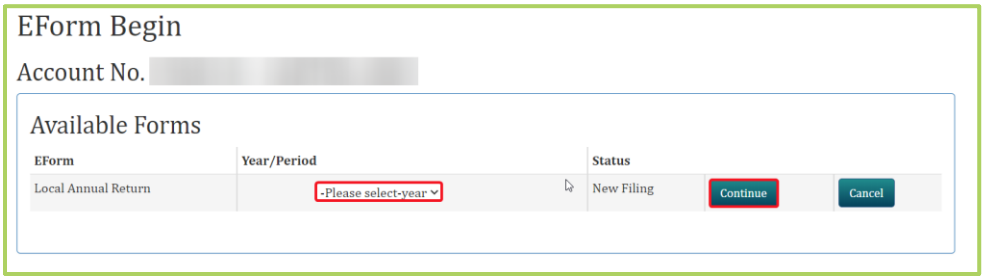


NOTE: *If there is not a form already in progress. Click Start New Form button.*

Starting a New Form

- Click the **Start New Form** button

The following screen displays:



E-Form

- Select the Available Form that is listed

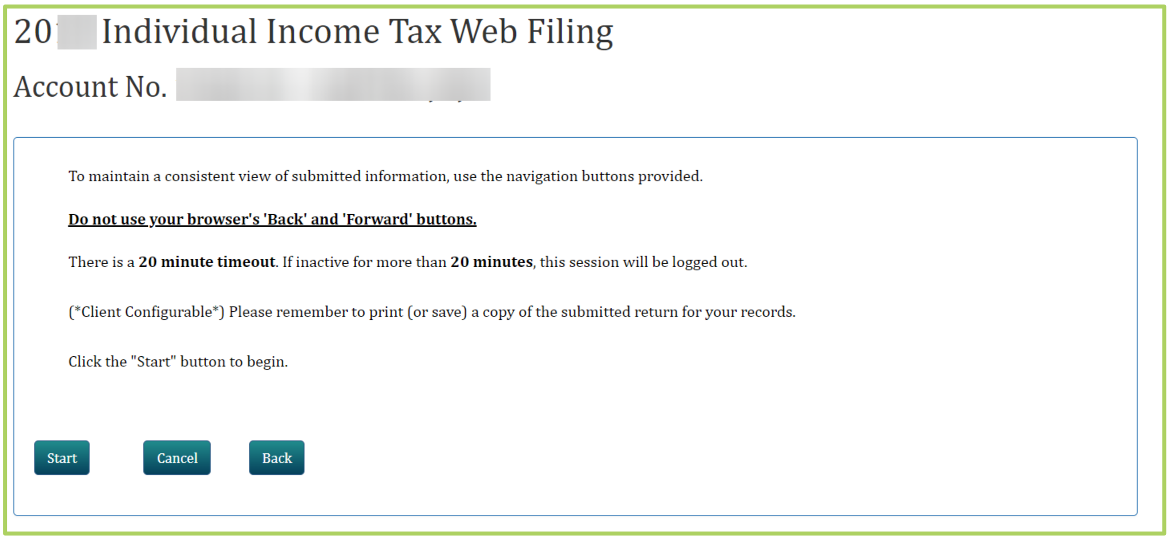
Year/Period

- Select the Year/Period from the drop-down you want to complete the E-Form for

Status

- Displays the status of the Form
- Click the **Continue** button to start the form or click the **Cancel** button to cancel the form request

A similar screen displays:


20 Individual Income Tax Web Filing

Account No.

To maintain a consistent view of submitted information, use the navigation buttons provided.

Do not use your browser's 'Back' and 'Forward' buttons.

There is a **20 minute timeout**. If inactive for more than **20 minutes**, this session will be logged out.

(*Client Configurable*) Please remember to print (or save) a copy of the submitted return for your records.

Click the "Start" button to begin.

Start Cancel Back

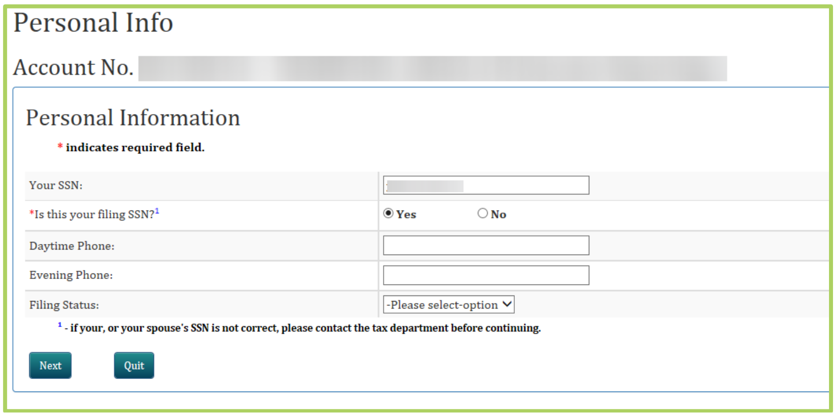
- Click the **Start** button to start the form or click the **Cancel** button to cancel the form

NOTE: *There is a 20 Minute Timeout!! If you are Inactive for 20 minutes, your session will be logged out, and you will need to restart the filing.*

WARNING!!! *Do Not use your browser's 'Back' and 'Forward' buttons.*

Personal Information Screen

- Enter all of your personal information


Personal Info

Account No.

Personal Information

* **indicates required field.**

Your SSN:	
*Is this your filing SSN?[1]	Yes No
Daytime Phone:	
Evening Phone:	
Filing Status:	-Please select-option

[1] - if your, or your spouse's SSN is not correct, please contact the tax department before continuing.

Next Quit

'*' Indicates required field

Your SSN:

- Enter your SSN

Is this your filing SSN?

- Select ***Yes*** if it is or select ***No*** if a different SSN is being used to file

Daytime Phone:

- Enter the best Daytime Phone number

Evening Phone:

- Enter the best Evening Phone number

Filing Status:

- Select the Status in which you are filing
  Status:
  Single
  Joint
  Head of Household

NOTE: *If **your**, or **your spouse's SSN** is not correct, please contact the tax department before continuing.*

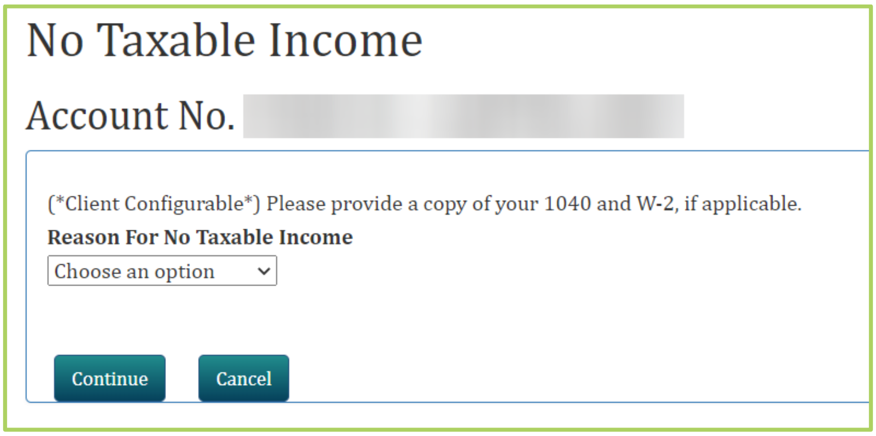
- Click the **Next** button to continue with filing or click the **Cancel** button to cancel out of the form

The following screen displays:

No Taxable Income

- Click the **No Taxable Income** button if you did not have any taxable income

The following screen displays:

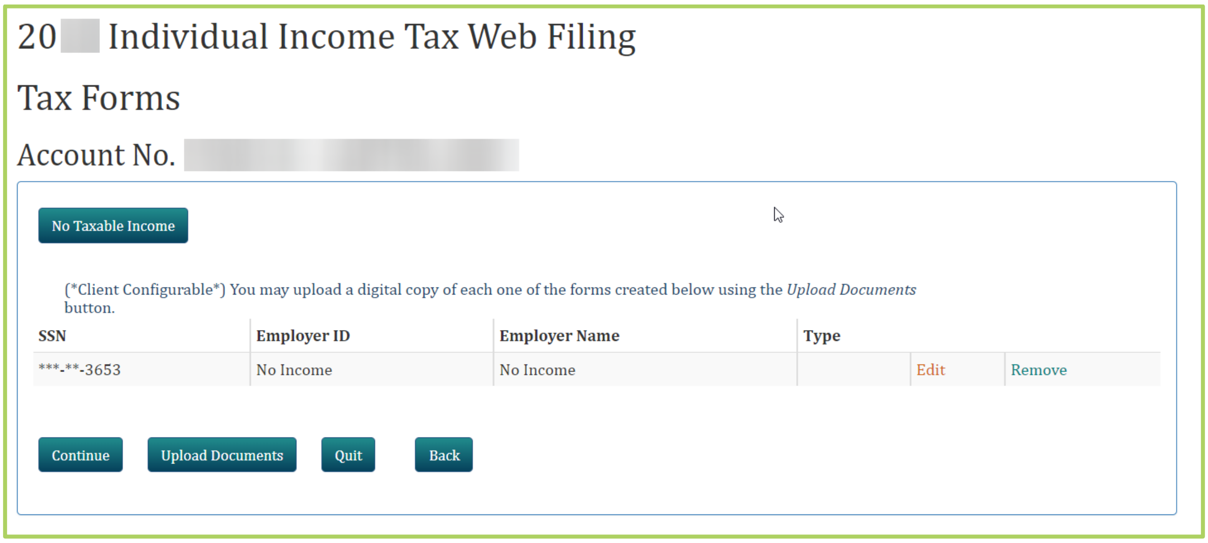


- Select the *Reason for No Taxable Income* from the drop-down

  Click to access the options:

  No Income
  Military
  Retired
  Permanent Disability
  Court Order
  Under 18 Years Old
- Click the **Continue** button to continue filing or click the **Cancel** button to cancel filing

The following screen displays:

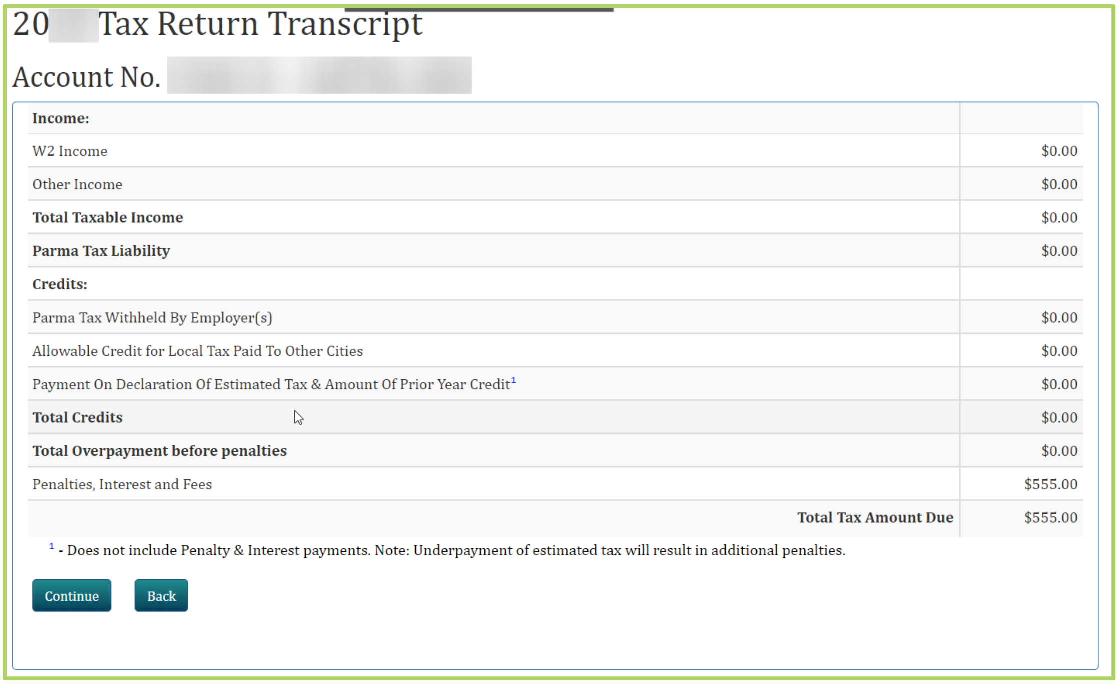


- Verify that the information is showing correctly
- If you need to upload supporting documents, click the **Upload Documents** button
- If you need to change the reason, click the **No Taxable Income** button and change your selection

NOTE: *Selecting the first option will nullify the No Income and bring the buttons back.*

- Click the **Continue** button to continue filing, click the **Back** button to go to the previous screen, or click the **Quit** button to cancel the filing

The following screen displays:



20 Tax Return Transcript

Account No.

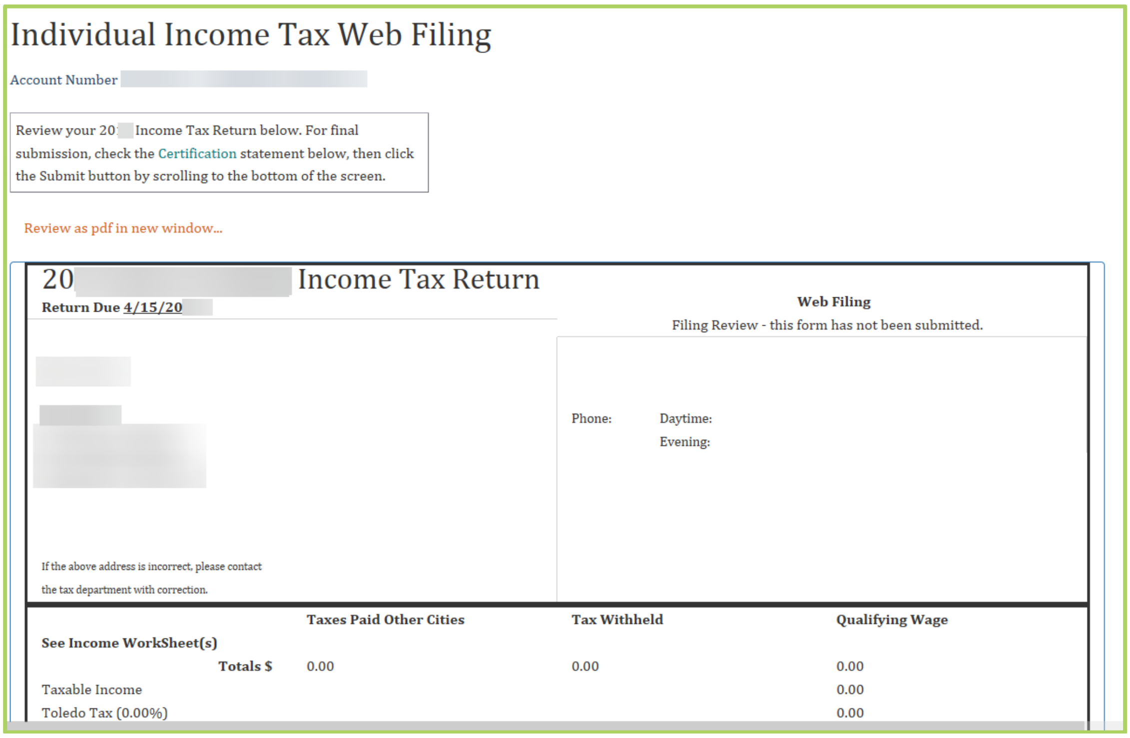
Income:	
W2 Income	$0.00
Other Income	$0.00
Total Taxable Income	$0.00
Parma Tax Liability	$0.00
Credits:	
Parma Tax Withheld By Employer(s)	$0.00
Allowable Credit for Local Tax Paid To Other Cities	$0.00
Payment On Declaration Of Estimated Tax & Amount Of Prior Year Credit[1]	$0.00
Total Credits	$0.00
Total Overpayment before penalties	$0.00
Penalties, Interest and Fees	$555.00
Total Tax Amount Due	$555.00

[1] - Does not include Penalty & Interest payments. Note: Underpayment of estimated tax will result in additional penalties.

Continue Back

- Verify that all of the information is showing correctly
- Click the **Continue** button to continue or click the **Back** button to go back to the previous screen

The following screen will display:


Individual Income Tax Web Filing

Account Number

Review your 20 Income Tax Return below. For final submission, check the Certification statement below, then click the Submit button by scrolling to the bottom of the screen.

Review as pdf in new window...

20 Income Tax Return

Return Due 4/15/20

Web Filing

Filing Review - this form has not been submitted.

Phone: Daytime:

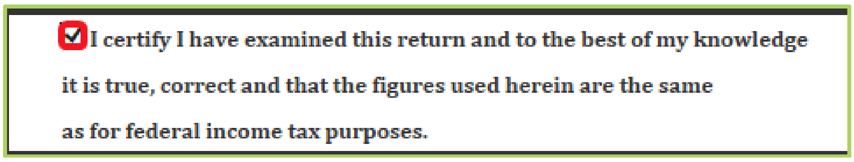
Evening:

If the above address is incorrect, please contact the tax department with correction.

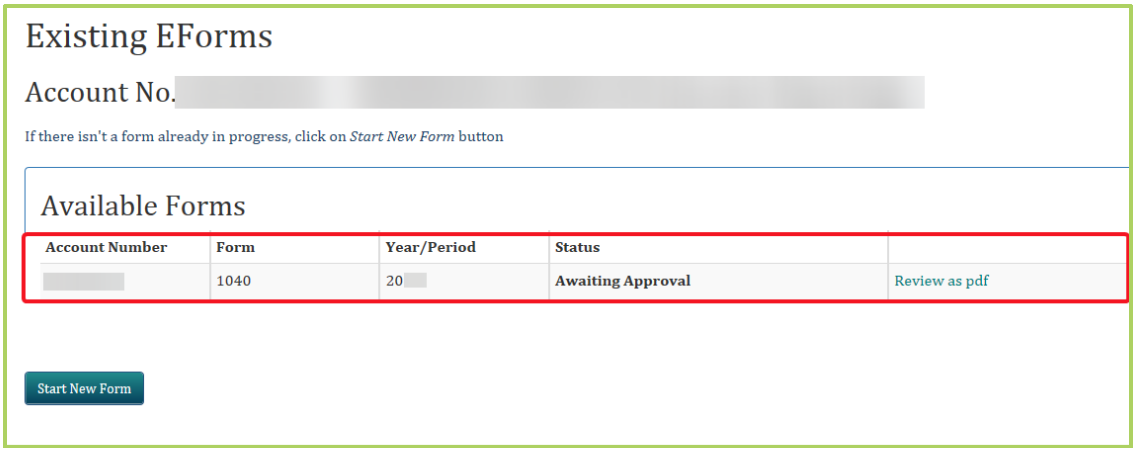
	Taxes Paid Other Cities	Tax Withheld	Qualifying Wage
See Income WorkSheet(s)			
Totals $	0.00	0.00	0.00
Taxable Income			0.00
Toledo Tax (0.00%)			0.00

- Once all of the information has been verified, place a checkmark in the box stating:

"I certify I have examined this return and to the best of my knowledge it is true, correct and that the figures used herein are the same as for federal income tax purposes."


I certify I have examined this return and to the best of my knowledge it is true, correct and that the figures used herein are the same as for federal income tax purposes.

- Once checked, a PDF can be saved by clicking the **Print PDF** button, otherwise, click the **Submit** button to continue
- After submitting, it will return to the Existing E-Forms screen and your created form will display under the Available Forms section


Existing EForms

Account No.

If there isn't a form already in progress, click on *Start New Form* button

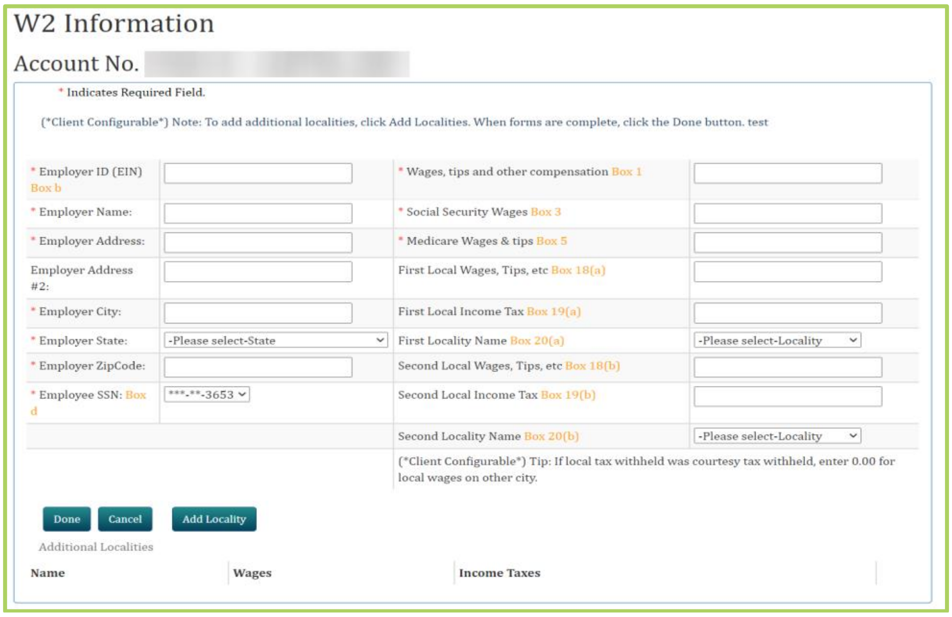
Available Forms

Account Number	Form	Year/Period	Status	
	1040	20	Awaiting Approval	Review as pdf

Start New Form

Add W2

- Click the **Add W2** button if you have a W2 that you would like to add



W2 Information

Account No.

* Indicates Required Field.

(*Client Configurable*) Note: To add additional localities, click Add Localities. When forms are complete, click the Done button. test

* Employer ID (EIN) Box b		* Wages, tips and other compensation Box 1	
* Employer Name:		* Social Security Wages Box 3	
* Employer Address:		* Medicare Wages & tips Box 5	
Employer Address #2:		First Local Wages, Tips, etc Box 18(a)	
* Employer City:		First Local Income Tax Box 19(a)	
* Employer State:	-Please select-State	First Locality Name Box 20(a)	-Please select-Locality
* Employer ZipCode:		Second Local Wages, Tips, etc Box 18(b)	
* Employee SSN: Box d	***-**-3653	Second Local Income Tax Box 19(b)	
		Second Locality Name Box 20(b)	-Please select-Locality
		(*Client Configurable*) Tip: If local tax withheld was courtesy tax withheld, enter 0.00 for local wages on other city.	

Done Cancel Add Locality

Additional Localities

Name	Wages	Income Taxes

(*) indicates required field.

Employer ID (EIN) (Box b):

- Enter the Employer ID (EIN) from Box b on the W2

Employer Name:

- Enter the Employer Name as displayed on the W2

Employer Address:

- Enter the Employer Address as displayed on the W2

Employer Address #2:

- Enter any additional address information such as Floor #, Suite #. Etc

Employer City:

- Enter the Employer's City

Employer State:

- Select Employer's State from the drop-down list

Employer Zip Code:

- Enter the Employer's Zip Code

Employee SSN (Box d):

- Enter your SSN as it is displayed in Box d on the W2

Wages, tips and other compensation (Box 1):

- Enter the dollar amount for Wages, tips and other compensation from Box 1 on the W2

Social Security Wages (Box 3):

- Enter the dollar amount for Social Security Wages from Box 3 on the W2

Medicare Wages & tips (Box 5):

- Enter the dollar amount for the Medicare Wages & tips from Box 5 on the W2

First Local Wages, Tips, etc (Box 18a):

- Enter the dollar amount for First Local Wages, Tips, etc from Box 18a on the W2

First Local Income Tax (Box 19a):

- Enter the dollar amount for First Local Income Tax from Box 19a on the W2

First Locality Name (Box 20a):

- Select the First Locality Name from the Drop-down list as displayed on the W2 in Box 20a

Second Local Wages, Tips, etc (Box 18b):

- Enter the dollar amount for Second Local Wages, Tips, etc from Box 18b on the W2

Second Local Income Tax (Box 19b):

- Enter the dollar amount for Second Local Income Tax from Box 19b on the W2

Second Locality Name (Box 20b):

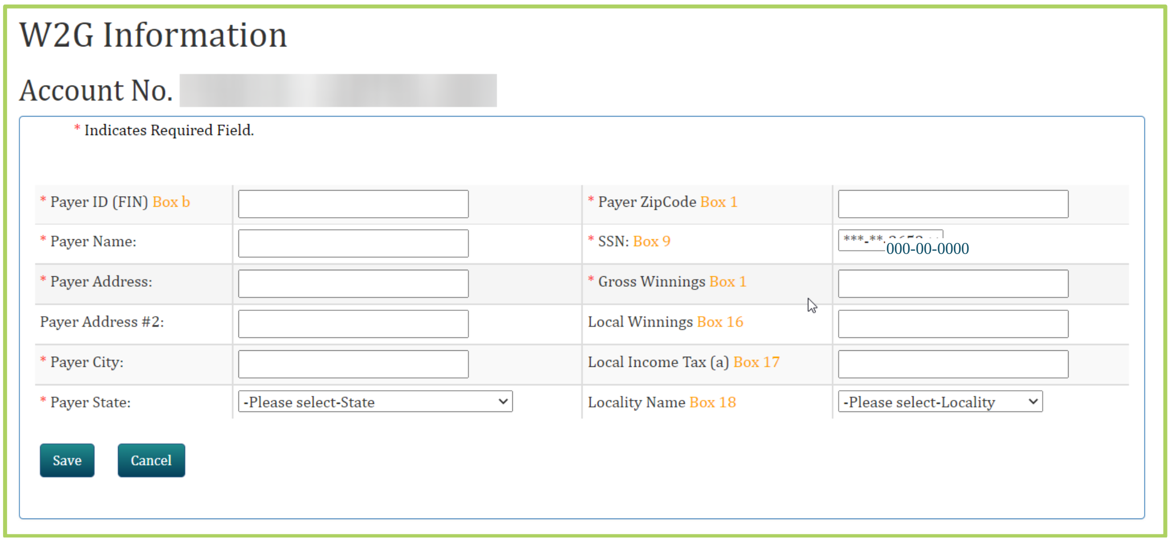
- Select the Second Locality Name from the Drop-down List as displayed in Box 20b on the W2

  NOTE: *In order to add additional localities, click **Save** and then the **Add Localities** button will be available to add additional localities. When you are done with this form click the **Done** button.*

- Click the **Done** Button to add the W2, click the **Add Locality** button to add another locality, or click the **Cancel** button to Exit the W2

Add W2G

- Click the **Add W2G** button if there is a W2G you would like to add



(*) indicates required field.

Payer ID (FIN) (Box b):

- Enter the Payer ID (FIN) from Box b on the W2G

Payer Name:

- Enter the Payer Name as displayed on the W2G

Payer Address:

- Enter the Payer Address as displayed on the W2G

Payer Address #2:

- Enter any additional address information such as Floor #, Suite #. Etc

Payer City:

- Enter the Payer's City

Payer State:

- Select the Payer's State from the drop-down List

Payer Zip Code (Box 1):

- Enter the Payer's Zip Code from Box 1 on the W2G

SSN (Box 9):

- Enter your SSN as displayed in Box 9 on the W2G

Gross Winnings (Box 1):

- Enter the dollar amount of Gross Winnings from Box 1 on the W2G

Local Winnings (Box 16):

- Enter the dollar amount of Local Winnings from Box 16 of the W2G

Local Income Tax (a) (Box 17):

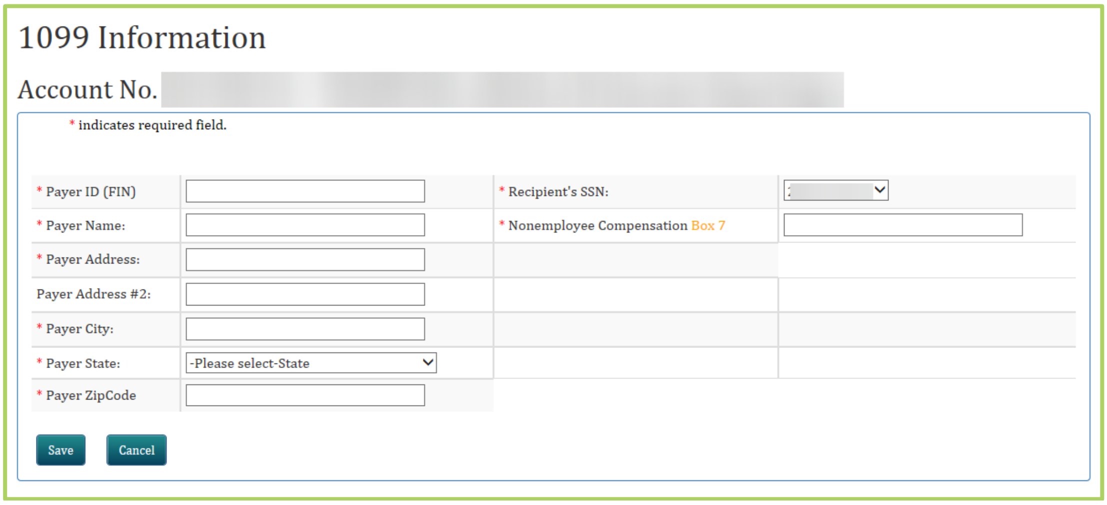
- Enter the dollar amount of Local Income Tax (a) from Box 17 on the W2G

Locality Name (Box 18):

- Select the Locality Name, as displayed in Box 18 of the W2G, from the drop-down List
- Click the **Save** button to add the W2G or click the **Cancel** button to Exit the W2G

Add 1099 Misc

- Click the **Add 1099 Misc** button if there is a 1099 Misc you would like to add


1099 Information

Account No.

* indicates required field.

* Payer ID (FIN)		* Recipient's SSN:	
* Payer Name:		* Nonemployee Compensation Box 7	
* Payer Address:			
Payer Address #2:			
* Payer City:			
* Payer State:	-Please select-State		
* Payer ZipCode			

Save Cancel

(*) indicates required field.

Payer ID (FIN):

- Enter the Payer ID (FIN) from the 1099 Misc

Payer Name:

- Enter the Payer Name as displayed on the 1099 Misc

Payer Address:

- Enter the Payer Address as displayed on the 1099 Mis

Payer Address #2:

- Enter any additional address information such as Floor #, Suite #. Etc

Payer City:

- Enter the Payer City as displayed on the 1099 Misc

Payer Zip Code:

- Enter the Payer Zip Code as displayed on the 1099 Misc

Recipient's SSN:

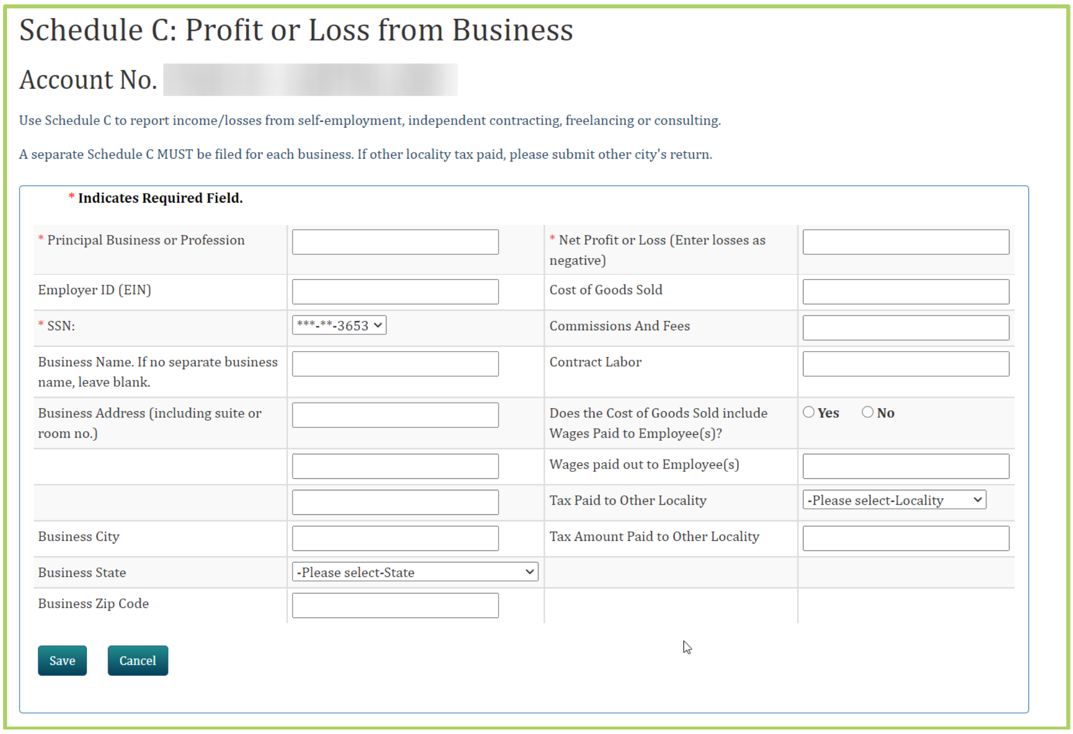
- Enter your SSN as displayed on the 1099 Misc

Nonemployee Compensation (Box 7):

- Enter the dollar amount for Nonemployee Compensation from Box 7 on the 1099 Misc
- Click the **Save** button to add the 1099 Misc. or click the **Cancel** button to Exit the 1099 Misc

Schedule C

- Click the **Schedule C** button if there is a Schedule C you would like to add
- Small Business Profit/Loss Tax Web Filing
- Schedule C – Income to report from self-employment, independent contracting, freelancing or consulting during the year



NOTE: *Each Schedule C is for the profit or loss from just one business, so if you had more than one business, you will need a Schedule C screen for each of them.*

(*) indicates required field.

Principal Business or Profession (Box a):

- Enter the Principal Business or Profession

Employer ID (EIN) (Box d):

- Enter the Employer ID (EIN)

SSN (Box d):

- Enter the SSN

Business Name. If no separate business name, leave blank:

- Enter the Business Name

Business Address (including suite or room no.):

- Enter the full Business Address

Business City:

- Enter the Business City

Business State:

- Select the Business State from the drop-down List

Business Zip Code:

- Enter the Business Zip Code

Net Profit or Loss (Line 31):

- Enter the dollar amount of Net Profit or Loss

Cost of Goods Sold (Line 42):

- Enter the dollar amount of the Cost of Goods Sold

Commissions And Fees (Line 10):

- Enter the dollar amount of Commissions and Fees

Contract Labor (Line 11):

- Enter the dollar amount of Contract Labor

Does the Cost of Goods Sold include Wages Paid to Employee(s)? (Line 33):

- Select Yes or No if the Cost of Goods include Wages Paid to Employee(s)

Wages paid out to Employee(s):

- Enter the dollar amount of Wages paid out to Employee(s)

Tax Paid to Other Locality

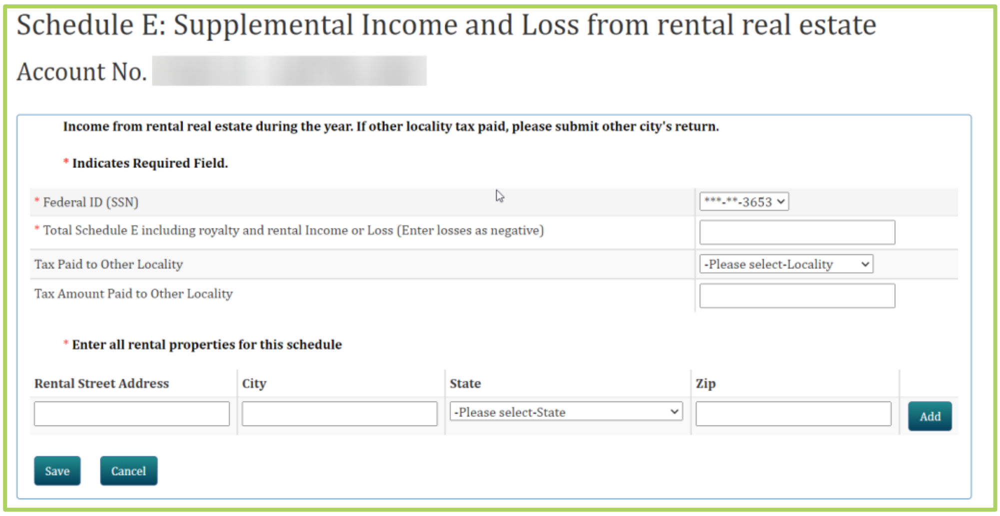
- Select the other locality where taxes were paid

Tax Amount Paid to Other Locality

- Enter the dollar amount paid to other locality
- Click the **Save** button to add the Schedule C or click the **Cancel** button to Exit the Schedule C

Schedule E

- Click the **Schedule E** button if there is a Schedule E you would like to add
- Income from Rental Real Estate during the year
- You will need to fill out a separate Schedule E for each Rental Property


Schedule E: Supplemental Income and Loss from rental real estate

Account No.

Income from rental real estate during the year. If other locality tax paid, please submit other city's return.

* Indicates Required Field.

* Federal ID (SSN)	***-**-3653
* Total Schedule E including royalty and rental Income or Loss (Enter losses as negative)	
Tax Paid to Other Locality	-Please select-Locality
Tax Amount Paid to Other Locality	

* Enter all rental properties for this schedule

Rental Street Address	City	State	Zip	
		-Please select-State		Add

Save Cancel

(*) indicates required field.

Federal ID (SSN) (Line A):

- Enter the Federal ID (SSN)

Total Schedule E including royalty and rental Income or Loss (Enter losses as negative) (Line 26):

- Enter the dollar amount of Total Rental Real Estate or Royalty Income (or Loss)

Tax Paid to Other Locality:

- Select the locality from the drop-down where other tax was paid

Tax Amount Paid to Other Locality

- Enter the dollar amount of Tax Paid to Other Locality

Rental Street Address (Line 26):

- Enter the full Rental Address

City (Line 26):

- Enter the Rental City

State:

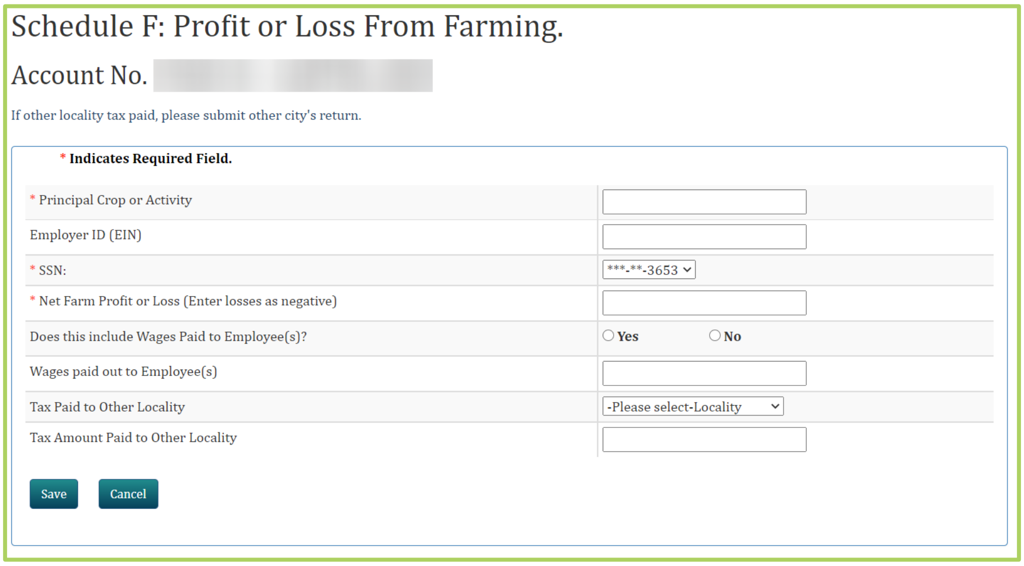
- Select the Rental State from the drop-down List

Zip (Line 26):

- Enter the Rental Zip Code
- Click the **Save** button to add the Schedule E or click the **Cancel** button to Exit the Schedule E

Schedule F

- Click the **Schedule F** button if there is a Schedule F you would like to add
- Income from Farming during the year



(*) indicates required field.

Principal Crop or Activity (Line A):

- Enter the Principal Crop or Activity

Employer ID (EIN) (Line D):

- Enter the Employer ID (EIN)

SSN (Box d):

- Enter the SSN

Net Farm Profit or Loss (Line 9):

- Enter the dollar amount of Net Profit or Loss

Does this include Wages Paid to Employee(s)? (Line 33):

- Select Yes or No if it includes Wages Paid to Employee(s)

Wages paid out to Employee(s):

- Enter the dollar amount of Wages paid out to Employee(s)

Tax Paid to Other Locality:

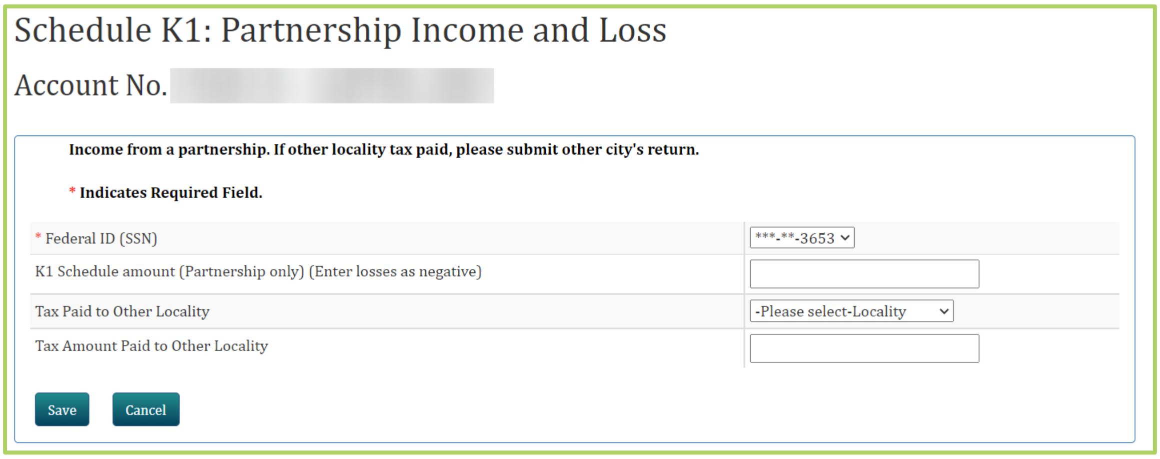
- Select the locality from the drop-down where other tax was paid

Tax Amount Paid to Other Locality

- Enter the dollar amount of Tax Paid to Other Locality
- Click the **Save** button to add the Schedule F or click the **Cancel** button to Exit the Schedule F

Schedule K1

- Click the **Schedule K1** button if there is a Schedule K1 you would like to add
- Income from a partnership during the year
- You will need to fill out a separate Schedule K1 for each Partnership


Schedule K1: Partnership Income and Loss

Account No.

Income from a partnership. If other locality tax paid, please submit other city's return.

* Indicates Required Field.

* Federal ID (SSN)	***-**-3653
K1 Schedule amount (Partnership only) (Enter losses as negative)	
Tax Paid to Other Locality	-Please select-Locality
Tax Amount Paid to Other Locality	

Save Cancel

(*) indicates required field.

Federal ID (SSN) (Line A):

- Enter the Federal ID (SSN)

K1 Schedule amount (Partnership only) (Enter losses as negative) (Line 26):

- Enter the dollar amount of K1 Schedule

Tax Paid to Other Locality:

- Select the locality from the drop-down where other tax was paid

Tax Amount Paid to Other Locality

- Enter the dollar amount of Tax Paid to Other Locality
- Click the **Save** button to add the Schedule K1 or click the **Cancel** button to Exit the Schedule K1